2016 Impact Report
Building Better Futures Together
**MAKING A DIFFERENCE**

for everyone who lives in Santa Barbara County

At United Way of Santa Barbara County we innovate and work smarter to make life better for children, families, and seniors in our community. We create and manage strategic partnerships with hundreds of local organizations and agencies to connect strengths, multiply resources, and implement the best plans and programs that will improve education, health, and financial empowerment throughout Santa Barbara County.

As usual, our 2016 Impact Report details the progress of our programs and initiatives, and allows us to acknowledge the generous support of the donors, volunteers, and partner organizations who make our work possible. This year, we’re also saying a special thank you to Paul Didier, our CEO for the past 42 years, who will be stepping down next year. We are proud of all he has accomplished and congratulate him on a job well done!
Dear Friends,

After 42 years, it is time for me to say goodbye and step down as United Way of Santa Barbara County’s CEO. Throughout the years, I have worked with so many wonderful and caring people—from hundreds of staff and board members, to more than a thousand community service partners, and tens of thousands of volunteers.

Together we have raised more than $130 million and improved the lives of hundreds of thousands of Santa Barbara County residents and their neighborhoods. It is abundantly clear that none of us could have done this alone. By supporting one another in numerous ways, we have been able to create award-winning programs that are responsible for countless success stories.

What I value most is the opportunity to have met, worked with, and learned from such a vast array of board members, staff, volunteers, and community partners. I am humbled by their dedication, hard work, and determination against incredible odds. They never fail to focus on making life better for those in our community who are in need.

Although I am stepping down as CEO, I will not be retiring from serving others. I have spent my adult life in community service and will continue, as I also look forward to continuing so many cherished friendships.

The future of United Way of Santa Barbara County is bright and promising. I am pleased to announce the United Way Board of Directors has selected Steve Ortiz, a dedicated 11-year executive of United Way, to take the reins as CEO in March 2017.

I will always be grateful for the support and friendship I have received over the last four decades. I thank you all for this extraordinary adventure.

G. Paul Didier, CFP, MBA
President and CEO
United Way of Santa Barbara County

Celebrating Paul Didier’s 42-Year Commitment to Our Community

In 1975, when Paul Didier became CEO of United Way of Santa Barbara County, Gerald Ford has just become president, the average home cost $25,000, and gas was 50 cents a gallon.

Those aren’t the only things that have changed. Here are a few of the ways United Way of Santa Barbara County (UWSBC) has grown and evolved over the last four decades with Paul Didier at the helm.

Went from three employees in a 500 square-foot rented office to 20 full-time and 70 seasonal employees in an 8,000 square-foot building owned by UWSBC.

Led the first ever county-wide assessment of what our community’s goals should be over the next decade—a process that took 18 months and involved interviewing more than 6,000 local residents.

Developed a volunteer-driven grantmaking process to fairly and quickly distribute donated funds after the disastrous Painted Cave Wildfire. The grantmaking process developed by UWSBC was later used as a model by the United Way of New York City to distribute funds raised for 9/11 relief.

While national statistics on volunteering have declined, the number of volunteers working with UWSBC has grown. For many years UWSBC has had the largest ratio of volunteers to population of any United Way in the U.S.

Established an $8 million endowment with $6 million in future commitments. UWSBC was the first United Way in the country to establish an endowment, starting a growing trend.

Developed a set of focused and highly effective programs and initiatives that bring different groups together to meet pressing community needs. These programs are unique to Santa Barbara County and exist nowhere else:

- Fun in the Sun page 4
- United for Literacy page 12
- United Learning Center page 14
- Kindergarten Success Institute page 11
- United for Financial Empowerment page 15
- United for Health page 15

G. Paul Didier, CFP, MBA
President and CEO
United Way of Santa Barbara County
Fun in the Sun

Now in its 20th year, Fun in the Sun (FITS) is a six-week summer learning program for local academically and financially at-risk children and their families. This year, FITS served 300 children and 200 parents. It’s Santa Barbara County’s oldest and largest public and private partnership dedicated to the long-term improvement of the lives of low-income children and families. Nationally recognized for innovation and excellence, Fun in the Sun was developed by United Way of Santa Barbara County to meet the unique needs of our community.

Fun in the Sun directly addresses summer learning loss and the resulting achievement gap between low-income students and their middle to upper income peers. The program brings together the best hands-on, project-based services and ideas from more than 70 local public and private organizations, and assembles more than 600 local volunteers to deliver them.

The results are extraordinary. In 2015, 93% of FITS participants maintained or improved their literacy skills—according to pre- and post-program assessments. The results have been so outstanding that in 2012, FITS won the National Excellence in Summer Learning Award from the National Summer Learning Association, an affiliate of Johns Hopkins University and the nation’s leading research body on summer learning.

Making Life Better for At-Risk Children and their Families

The program has been designed to have lasting positive impact on the lives of at-risk children. We have learned that in order to achieve this goal, we must engage parents as well as children. That’s why we require parents or guardians of Fun in the Sun participants to attend five parent education sessions during the course of the program. In addition to parenting skills, the sessions cover topics—like wellness and financial empowerment—that benefit the entire family.

We also ask each participant’s family to contribute a small portion of the program’s $1200 per-child cost. While the donation is voluntary, participation in the parenting sessions and attendance at FITS sessions is not. This approach helps to ensure that both parents and children are truly committed to working toward a brighter future.

Throughout the Program, FITS Participants Benefit from

- Adult Mentorship
- Character Values & Education
- Courtesy & Manners
- Daily Reading, Writing, and Math Instruction
- Environmental Education
- Expression through the Arts
- Family Fun Nights
- Financial Literacy Training
- Field Trips
- Health Services
- Healthy Lunch and Snacks
- Martial Arts
- Nutrition and Health Education
- Parent Education Seminars
- Public Speaking Exercises
- Self-Esteem Building Activities
- Service Learning Activities
- STEAM* Educational Activities
- Swimming Lessons
- Team-Building Exercises

*The STEAM curriculum includes educational activities in science, technology, engineering, art, and math.
**Fun in the Sun**

Santa Barbara County’s Home-Grown Program Has Gained a Glowing National Reputation

**1996**
Fun in the Sun began as a drop-in recreational program for 20 young students at Ortega Park in Santa Barbara. It was originally a collaboration of three agencies designed to provide a safe environment for children who would otherwise be unsupervised.

**1998 to 2000**
FITTS broadened its scope to include academic components, family support services, and the Lunch Bunch volunteer mentorship program. (see next page).

**2001 to 2003**
FITTS branched out to Goleta and Santa Barbara’s Westside, serving nearly 200 children, including youth ages 13-17 through a new Counselor-in-Training program.

**2007 to 2009**
FITTS expanded to a new site in Carpinteria, which enabled it to serve a record-breaking 364 participants and their families.

**2010**
FITTS became one of just 13 organizations out of 2,000 applicants nationwide to receive a federal grant from the Corporation for National and Community Service to incorporate service-learning. A fifth FITTS site was opened in Guadalupe.

**2011 to 2012**
As part of a strategic plan to create a world-class program, FITTS introduced daily structured Power Reading sessions and new STEAM curriculum components. In 2012, the National Summer Learning Association (an affiliate of Johns Hopkins University) awarded FITTS the Excellence in Summer Learning Award as best in the country.

**2013 to 2015**
FITTS expanded to Santa Ynez and introduced Power Math and new junior high school curriculum components.

**Today**
FITTS provides comprehensive and integrated academic, behavioral, and social skill development services to 300 participants at five south Santa Barbara County sites each year. The partnership has grown to include more than 70 service delivery partners, over 20 funding partners, and more than 600 community volunteers. With the community’s support, 97% of 2015 Fun in the Sun participants actually improved their literacy skills instead of losing three months of prior skills (the average summer learning loss experienced by lower-income students each summer).

This very popular volunteer opportunity brings local professionals and community members in to serve as mentors to Fun in the Sun scholars during the lunch hour. Volunteers find engaging with the students while explaining their professions and careers to be extremely rewarding. And, our students become aware of options and opportunities they never knew existed. For some, these sessions ignite dreams that set them on the path to a brighter future. Last year, more than 500 volunteers participated as Lunch Bunch Mentors—to the benefit of everyone involved.

**2016 Lunch Bunch Teams Included**

- Abaco
- AGIA
- Agilent
- Bartlett, Pringle & Wolf
- BioIQ
- Brown & Brown Insurance
- Carpinteria Morning
- Casa Dorinda
- City National Bank
- Cottage Health System
- Conversant Summer of Service
- Damitz, Brooks, Nightingale, Turner & Marisset
- Deckers
- Hearts of Bacara
- Invoca
- Lockheed
- MacFarlane, Faletti & Co.
- Montecito Bank & Trust
- Nordstroms of Santa Barbara
- Northern Trust
- RightScale
- SB Scholarship Foundation
- SBCEO
- See International
- Sientra, Inc.
- Team TrueVision
- The Zia Group
- Union Bank
- Venice
- Wells Fargo

To learn more about United for Literacy visit unitedwaysb.org/ufl
2016 Fun in the Sun Donors

$10,000 +
AGIA Affinity Services
County of Santa Barbara
Behavioral Wellness Department
Edison International
The Errett Fisher Foundation
Lady Leslie Ridley-Tite
Lillian Lovelace
Santa Barbara Foundation
Maryan Schall
Valentine Family Foundation
Weingart Foundation
John and Virginia Wigle

$3,000 – $9,999
Assistance League of Santa Barbara
Bank of America
The Coeta & Donald Barker Foundation
Ron and Marlys Boehm
Cox Communications
Decker Outdoor Corporation
Herbert and Gertrude Latkin Foundation
Montecito Bank & Trust
Rotary Club of Santa Barbara
Charitable Foundation
Towbes Foundation
UCSB Associated Students
Union Bank
Valley Foundation

$1,000 – $2,999
Mr. Vince Caballero
Ms. Julia Delgado
Mr. Robert Ludwig Muhr
Mrs. Susan R. Aguilar
Mr. Scott Black
Mr. Bob Bogle
Ms. Merry Wilson
Mr. Michael H. Green
Ms. Marta Greenne
Judy Guillermo-Newton
Leo P. Hamill
Ms. Stina Hans and Mr. Joel Kreiner
Jeff and Julie Harris
Mr. Michael Hausknot CFP
Mr. Cody Howen
Mrs. Tracy Jenkins
Mr. James P. Kennett
Mr. Shawn Kevin Kiehn

2016 Service Delivery Partners

Fairview Gardens
Oak Valley Elementary School Partners in Education
Family Service Agency
Pleasant Valley Schoolhouse
American Indian Health & Services
Police Activities League
American Red Cross
Red Feather Ball
Santa Barbara County
Arts for Humanity
RRM Design Group
Assistance League of Santa Barbara
Safety Matters
City of Goleta
Certified Training
County of Santa Barbara
Goleta Union School District
Santa Barbara
Brilliant Elementary School
Cachuma Lake
Key Class
Cancer Center of Santa Barbara
La Cumbre Junior
with Sansum Clinic
High School
Carpinteria Library
Lockheed Martin
Carpinteria Unified School District
MarBorg Industries
Casa Dorinda
Music Academy of the West
City of Buellton Parks and Recreation
Nature Track
City of Carpinteria
Notes for Notes
City of Carpinteria Aquatics
Casa Dorinda
City of Goleta
City of Solvang Parks and Recreation
College School District
Cottage Health
Cornelia Moore Dental Foundation
County of Santa Barbara
Casa Dorinda
County of Santa Barbara
Dr. Neil Mietus
Behavioral Wellness
East Side Library
Direct Relief International
Easy Lift
Dr. Neel Mietus
EdoCraft Circuit
EduCraft Circuitry
US Bank
El Camino Elementary School
Dr. Mary Jean Vignone
Everybody Dance Now
Explore Ecology

2016 Impact Report
United for Education

We know that a good education is one of the foundations of a successful life. United Way of Santa Barbara County has developed a range of innovative programs that help to realize a good education for those in our community who are academically and financially at risk.

United for Literacy

Since this educational partnership’s inception in 2009, United for Literacy has helped more than 4,500 local children, families, and seniors improve literacy skills. Working with 48 different schools, six non-profit organizations, and three local businesses, United for Literacy offers a unique combination of services that boost reading levels and improve graduation rates. More than 75 percent of all program participants advancing two or more reading grade levels each semester.

In addition to research-based literacy advancement techniques, United for Literacy takes advantage of sophisticated, common core standards aligned, online educational software. The Power Reading Program utilizes Lexia and Reading Plus software to serve learners from pre-K to adult levels. The Power Math Program is an accelerated math improvement tool for grades K-6. The key to these programs’ success is that they all provide individualized and highly customized instruction for each learner. Students become engaged as they gain new skills and advance at their own pace.

To learn more about United for Literacy visit unitedwaysb.org/ufl

Kindergarten Success Institute

This important program fills a rapidly expanding need. Local teachers tell us that often more than half of their students start kindergarten without the most basic knowledge of numbers, shapes, and colors; the ability to use scissors, sit in a circle, share, or cope with frustration.

Kindergarten Success Institutes take place at 11 different schools for three to four weeks before the school year begins. Incoming kindergartners learn school-related skills and behaviors that will be essential to their success. For many of these children, catching up to their middle and upper income peers can be extremely difficult. In fact, a great many never do. Kindergarten Success Institutes give them the chance to gain equal footing.

Parent Success Institute

Many low-income parents feel incapable of influencing their children’s education, and depend solely on the schools. So, these disadvantaged children miss early education opportunities and start kindergarten months or years behind their peers. In a gap that tends to widen during the elementary school years.

Our Parent Success Institute addresses this problem through a series of classes that focuses on positive methods of discipline, effective communication, and fostering a nurturing and positive relationship. Parents become enabled to promote literacy and healthy development throughout early childhood and adolescence.
United Learning Center
Effective, Affordable, Personalized Learning Support for K–12 Students

United Learning Center is an innovative fee-based service that provides K–12 students a unique and effective learning experience tailored to meet their specific needs. Highly interactive, internet-based reading and math programs are individually calibrated for every learner.

At United Learning Center, a credentialed school teacher assesses every student before creating a customized learning plan. The teacher monitors students’ progress, instructing and coaching them along the way. With a maximum student-to-teacher ratio of four to one, each child receives as much attention as he or she needs. Because United Learning Center is sponsored by United Way of Santa Barbara County, we are able to offer the service at rates 25% below most commercial tutoring companies.

The United Learning Center grew out of the success of United Way of Santa Barbara County’s United for Literacy Program. We received inquiries from parents whose children’s schools were not participating in that program. They wanted their children to have access to those tools. It was clear that our impact in the community would be multiplied by working with any student who felt they could benefit...and the United Learning Center was born.

To learn more about United Learning Center visit unitedlearningcenter.org

Goleta Union School District Literacy Partnership

After four years of excellent results at five Goleta Union Schools, United Way of Santa Barbara County’s Power Reading Program is being expanded to all nine schools in the Goleta Union School District. The first phase of the partnership will span a three-year period from August 2016 to August 2019. This district-wide project—with its individualized, research-based literacy tools and techniques—has the potential to significantly improve the futures of thousands of children and their families.

United for Education

Dolly Parton Imagination Library

More than 60 percent of children in low-income families have no access to books in their homes. United Way of Santa Barbara County increases access to books for children under the age of five through a partnership with the Dolly Parton Imagination Library. This innovative program sends a brand new, age-appropriate book every month to more than 1,400 local families at no charge.

We know that reading to a pre-school child is the single most important way to prepare them for success in school. By placing books selected by educational experts directly into Santa Barbara County homes, we create opportunities for parents and children to spend time together in an enriching way that will pay big dividends down the road.

Ignite a Child’s Love of Reading

We’re happy that our partnership with the Dolly Parton Imagination Library brings a new book to more than 1,400 local kids every month. We wish we could do the same for the 300 children still on the waiting list. The annual cost for each child is $52, of which the Dollywood Foundation pays half. An $8,000 donation would eliminate the waiting list and bring the joy of reading to hundreds of deserving kids.

To learn more about United Learning Center visit unitedlearningcenter.org
The aim of our United for Financial Empowerment Partnership is to increase financial stability in low and moderate-income families (those earning less than $60,000 for a family of four). Many of them have never filed a tax return, and have nothing put away for emergencies or their children’s education. These are hard-working people who could be financially devastated by something as small as an unexpected auto repair. We employ a variety of strategies to help them achieve financial stability:

Establish and maintain emergency savings accounts by contributing some amount of money from each paycheck. The initial goal is to save $1,000, with a long term goal of saving an amount equal to six months of living expenses.

Improve financial literacy by attending and graduating from bilingual, IRS-approved community financial literacy programs.

Reduce debt by learning and practicing proven debt reduction techniques.

Fund retirement savings in an IRA with 5–15% of every paycheck.

Maximize tax credits and deductions, and eliminate tax preparation costs by using our Volunteer Income Tax Assistance (VITA) and Senior Tax Assistance.

Create, fund, and maintain a tax-deferred college and career savings plan.

To learn more about United for Financial Empowerment visit unitedwaysb.org/fep

Our United for Health Initiative combines the efforts of multiple community partners to increase the number of low-income and at-risk Santa Barbara County residents who receive health screenings, preventative care, access to needed services, and prescription medications. The medical services discount program outlined below has been an important part of this program.

Many of Santa Barbara County’s most vulnerable residents—seniors and low-income families—must choose between filling prescriptions or receiving medical services and putting food on the table. To alleviate some of this financial strain and improve the health of those in our community, United Way of Santa Barbara County offers medical services discount cards that let local residents save on prescription drugs, dental work, vision care, hearing supplies and care, lab work, imaging, diabetic supplies, and even veterinary expenses.

In association with AGIA (one of our top employee and corporate donors) and Paramount Rx, we negotiated a deal to provide a Health Services Discount Card that is honored at more than 54,000 pharmacies nationwide.

We then partnered with more than 20 local non-profit agencies to get the cards into the hands of those who need them most. Participants simply show their card when filling a prescription or paying for qualifying services and receive an automatic discount (currently about 45% off regular cost). This helps to keep chronic conditions from becoming serious, improves the quality of participants’ lives, and reduces the strain on public assistance and emergency medical services.

To learn more about United for Health visit unitedwaysb.org/health
United Way of Santa Barbara County’s Young Leaders Society provides community involvement, encourages philanthropy, and develops personal learning opportunities for young professionals. This unique and dynamic group offers its members multiple ways to become involved in community initiatives that make a difference in peoples’ lives—while having fun.

This year alone, over 125 YLS members ages 45 and under contributed over $60,000 through personal donations and special events to support United Way activities. This program is for young individuals who want to take active and visible leadership roles in community projects, committees and boards. It also serve as a mechanism to promote the work, activities, and initiatives developed by United Way of Santa Barbara County that focus on education, financial empowerment, and health.

David Duarte, who has served on the YLS volunteer Executive Committee since 2010, was named 2015 Young Leader of the Year. Since joining the society, David has completed over 250 hours of volunteer and community service through UWSBC’s Fun in the Sun Lunch Bunch mentoring program, Day of Caring, United We Read, and other YLS activities. As he says, “My experiences as a YLS member are invaluable. It’s exciting to see the positive impact of our leaders on the community and on each other. I leave each event energized and inspired to be more involved and proud to be part of a group of such talented and successful people.”
On December 5, 2015, United Way of Santa Barbara County celebrated its 19th Annual Red Feather Ball at the Four Seasons Biltmore Coral Casino in Santa Barbara. Guests enjoyed cocktails, a silent auction, music before dinner and a live scholarship auction. 2015 Honorees were the Santa Barbara Foundation and Janet Garufis, President and CEO of Montecito Bank & Trust.

Proceeds from the Red Feather Ball support United Way of Santa Barbara County’s national award-winning Fun in the Sun and United for Literacy programs.

For more information on Red Feather Ball, visit unitedwaysb.org/rfb

On May 18, 2016, United Way of Santa Barbara County hosted its 93rd Annual Awards Celebration at the Four Seasons Biltmore Hotel. This special dinner recognizes the efforts of local organizations and individuals. Twenty-five awards were presented to volunteers, businesses, schools, and organizations for their community involvement and outstanding support of United Way of Santa Barbara County. The 2016 Annual Awards Celebration was made possible by the generous sponsorship of the Four Seasons Biltmore, Floral Ambiance, Montecito Bank & Trust, and John Kochis.

United for Health Partner of the Year
Cornelia Moore Dental Foundation

Outstanding Day of Caring Partner
Mentor Corporation

Outstanding Fun in the Sun Individual of the Year
Jim Brown

Outstanding Fun in the Sun Organization of the Year
Assistance League of Santa Barbara

Financial Empowerment Partner of the Year
Santa Barbara Police Activities League

United For Literacy Individual of the Year
Barbara LaCorte

United For Literacy Organization of the Year
Goleta Union School District

Community Impact Individual of the Year
Liz Barnitz

Community Impact Organization of the Year
Harding School

Outstanding Leadership Workplace
Cottage Health

Outstanding Employee Campaign Manager for 1-100 Employees
Henry Dubroff

Outstanding Employee Campaign Manager for 100-250 Employees
Vicky MacGregor and Kendra Marmé

Outstanding Employee Campaign Manager for More than 250 Employees
Cottage Health Committee

Outstanding Division Award Education
UCSB

Outstanding Division Award Public
City of Goleta

Outstanding Division Award High Tech
Aera Energy LLC

Sponsors

RED FEATHER
Aera Energy

PLATINUM FEATHER
City National Bank
Jim & Stephanie Sokolove
Bob & Val Montgomery

GOLD FEATHER
Montecito Bank & Trust
Santa Barbara Foundation
Santa Ynez Band of Chumash
Indian Foundation
Union Bank

SILVER FEATHER
Casa Dorinda
Cottage Health
John & Susan Hanna
SBCC Foundation

BRONZE FEATHER
CitiBank
CSU Channel Islands
Dennis Forster
Juliette Cummins Sponsel
Mayan Schall
Shawn Kiehn, Lexia Reading
Santa Barbara Chamber of Commerce
Susan Matsumoto & Mel Kennedy

PEWTER FEATHER
AGIA Affinity Services
American Indian Health & Services
Banc of California
Ron & Maryls Boehm
Fielding Graduate University

UNDERWRITERS
City National Bank
Bryan & Sons
Reading Plus/The Ware Group
Aha B. Slokka Foundation
John Kochis
Jim & Stephanie Sokolove
Renegade Wines

2015 honorees Janet Garufis and Ron Garufis, Santa Barbara Foundation

2015 honorees Janet Garufis and Ron Garufis, Santa Barbara Foundation
Executive Club

These accomplished local public and private sector leaders are members of United Way of Santa Barbara County’s Executive Club. We appreciate the significant contributions they make through their personal and organizational commitment to improving the lives of everyone in our community.

Not pictured
Jim Bechtel, Managing Director, Alamar Capital Management, LLC
George Tharakan, CFA, Chief Investment Officer, Alamar Capital Management, LLC

Top Workplaces

Workplace giving is essential to the success of United Way of Santa Barbara County’s local community initiatives. Last year, more than 6,000 individuals from 175 workplaces donated to our annual campaign. Here are the largest contributing workplaces.

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<th>Employee Gifts</th>
<th>Special Event Gift</th>
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<td>$9,898</td>
<td>$36</td>
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<tr>
<td>Goleta Sanitary District</td>
<td>$7,348</td>
<td>$7,348</td>
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Totals and Averages | $150,332 | $82,075 | $24,484 | $1,000,501 | $605 | 293 |

*Community All Stars have contributed a total of $500 or more to United Way of Santa Barbara County for three or more consecutive years.
**Outstanding Supporters**

Karen and Arlen Knight

Arlen and Karen Knight became Heritage Club members in 1992 when they funded a Charitable Remainder Trust (CRT) with Arlen’s family business and named United Way as the beneficiary. Selling the business in the CRT was a win/win for their family and for the people of this community. As Karen’s passion for the importance of what United Way is doing within the community grew, she decided to get more involved and became United Way’s Leadership Services Officer. Karen also led by example as an active member of the United Way’s Board of Directors.

**Building Endowment Fund**

keeps our Guiterrez Street home in good repair, helping with maintenance and larger capital needs.

**Children’s Services Endowment Fund**

focuses on the needs of children and ensures on-going funding for United Way’s unique programs that address the complex issues faced by local children.

**STAR Staff Endowment Fund**

addresses the need to attract, develop, and retain talented staff.

**Donor Advised Funds**

offer an alternative to family foundations, allowing individuals to earmark their charitable investments for specific projects, charitable goals, or areas of concern.

**Community Disaster Fund**

stands ready to help local non-profits and local survivors of state and federally declared disasters.

---

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Doiron Financial Associates  
Marilyn Anticouni, Esq.  
Attorney at Law  
Michael J. Bergquist, JD, CFP  
Bergquist Wang, LLC  
Dennis Forster, CFP  
The Forster Group at Morgan Stanley  
Joseph Green, Esq.  
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Jarrott & Company  
Joe Lanzo, CPA, AEP  
McGowan Gunternam  
Suzi Schamer  
Montecito Bank & Trust  
Honorary Member  
Earl Damitz

---

**Heritage Club**

The Heritage Club was established to recognize those forward-thinking individuals who have made provisions to leave their legacy to this community. By virtue of their generosity to United Way of Santa Barbara County’s Endowment, the individuals listed on this page are recognized as members of the Heritage Club in perpetuity.

**General Endowment Fund**

provides resources to respond quickly to challenging conditions in our community and to forge solutions by creating partnerships with other services and organizations.

**Long-Term Community Goals Endowment Fund**

provides a perpetual source of predictable, stable revenues to support the vital services that will achieve the community’s long term goals in education, financial empowerment, and health.

---

**Health**

Lubomir & Wilmelina Fast  
Howard & Jean Fenton  
Dorothy T. Flynn  
Wilson & Julia Forbes  
Dominique & Patrick Forster  
Mildred C. Frisbee  
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Judy Goodbody  
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Gutierrez  
Dorothy B. Hall  
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Ellen Harrison  
Cecil M. & Lois Gwen Hefner  
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John C. Hubbard  
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Frank & Barbara Kelly  
Arlen & Karen Knight  
Richard & Linda Johnston  
Mary Ann Kriebel  
Richard & Linda Johnston  
Mary C. & Quinton L. Plankett  
William J. Roberts  
Dr. Ursula F. Henderson, M.D.  
Terry & Tom Dierig  
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Attorney at Law  
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Robert Bach  
Lubomir Kozak  
Howard Kozak  
Dorothy Kozak  
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Richard & Linda Johnston  
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Florence Lamb  
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Arthur & Edith Lenart  
Daniel J. Lif  
A. Myles Limburg  
Richard L. & Chiyoko Long  
Charles Lucky  
Madelon Gail Lucky  
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Richard Kozak  
Florence Lamb  
Shepherd Lee  
Arthur & Edith Lenart  
Daniel J. Lif  
A. Myles Limburg  
Richard L. & Chiyoko Long  
Charles Lucky

---

**Heritage Club members** were honored at a private luncheon at the El Encanto Hotel on June 1, 2016. This event was generously sponsored by Dennis and Jeff Forster of the Forster Group at Morgan Stanley.

To learn more about becoming a Heritage Club member, contact Judy Goodbody at 965-8591, ext. 120, email jgoodbody@unitedwaysb.org or visit unitedwaysb.org/giftplanning.
Alexis de Tocqueville Society

We extend special thanks to members of the Alexis de Tocqueville Society. This group of generous local philanthropists truly embraces the concept of creating positive change by making annual donations of $10,000 or more to United Way of Santa Barbara County.

Silver Leadership Circle

$3,000 – $5,999

Anonymous

ORDRE D’EGALITE

$50,000 +

Anonymous

ORDRE DE LIBERTE

$25,000 – $49,999

Aera Energy LLC

County of Santa Barbara

Behavior Wellness Department

Edison International

Goleta Union School District

John and Susan Hanna

Mrs. Lillian P. Lovelace

John and Virginia Wigle

AGIA Affinity Services

Walter and Holly

Thomson Foundation

Union Bank

MEMBRES DE LA SOCIETE

$10,000 – $24,999

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Ron and Marlys Boehm

Robert Caldwell

Ms. Julie Capritto

City National Bank

William and Renee Curtis

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Valentine Foundation

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Weingart Foundation

Wood-Clayssens Foundation

Kirt and Nicole Woodhouse

Leadership Circles

Our Leadership Circle Members play a vital role in the success of our programs and initiatives by making donations of $1,000 to $10,000 annually.

Gold Leadership Circle

$6,000 – $9,999

Dorothy Chon and Joseph Polchinski

Lance Connor and Nancy Werner

Bobbi and Paul Didier

The Honorable and Mrs. William L. Gordon

Michael and Betty Noling

Dr. and Mrs. Jim Tamborello

Silver Leadership Circle

$3,000 – $5,999

Brian Abercrombie

The Ugo Peter “Butch” Arnoldi Family

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Ralph and Jan Baster

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David and Louise Borgetello

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Jim and Marcia Wolfe

1 Anonymous Donor

A major purpose of this publication is to honor our donors, volunteers and community partners. We have listed donors whose pledges were received by May 31, 2015—except for those who wished to remain anonymous and those whose names were withheld in accordance with workplace policy. We make every effort to include everyone and list all names correctly. We regret any errors and ask to be notified of corrections at 805.965.8591.

NAMES IN BOLD are United Way Community All Stars, who have contributed a total of $500 or more to United Way of Santa Barbara County for three or more consecutive years.
For the past seven years, Montecito Bank and Trust has graciously provided their staff to lead financial literacy courses for Fun in the Sun Trust. Your generosity has allowed us to teach about saving, investing, and wise financial decisions. Montecito Bank and Trust, under the leadership of Ms. Wende Cappetta, Robert C. Hecht, Mr. and Mrs. Donald A. Jackson, and Christine Hackett, has played a pivotal role in making these courses possible.

**United Way of Santa Barbara County 2016 Impact Report**

Montecito Bank and Trust and its partners have been instrumental in educating our community about financial literacy. Their support has not only helped in the delivery of courses but also in empowering our community to make informed financial decisions. We are grateful for their commitment and dedication to our community's well-being.
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Thank you for your generosity. Your support allows United Way to tackle our community’s greatest needs and improve the lives of the people we serve. The work you’ve supported in this report has helped us achieve equitable improvements in the lives of the most vulnerable in our community. Your generosity has changed lives. We are deeply grateful.

The County of Santa Barbara conducts the largest charitable giving campaign in the county, raising over $204,000 last year. They also partner with us to provide literacy courses to the men and women on probation and in the county jail. This partnership has enormous impact on individuals going through the criminal justice system, as well as their families.

The County of Santa Barbara
to understand local environmental concerns, participants on the environment—helping them Fun in the Sun program since 2013, educating Explore Ecology has partnered with United Way's
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NAMES IN BOLD are United Way Community All Stars, who have contributed a total of $500 or more to United Way of Santa Barbara County for three or more consecutive years.

THANK YOU!

The Family Service Agency has partnered with United Way for over 10 years to provide parent education and child advocacy. Their participation in Fun in the Sun enhances relationships between parents and students, and students and staff through their extensive background and skill set in case management, service linkage, outreach, cultural competency, confidentiality, child abuse prevention, and parent engagement strategies.
UNITED WAY OF SANTA BARBARA COUNTY

NAMES IN BOLD are United Way Community All Stars, who have contributed a total of $150 or more to United Way of Santa Barbara County for three or more consecutive years.

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In-Kind Gifts

Gifts to United Way of Santa Barbara County come in many different forms. The generous donations from those listed on this page were in the form of goods, services, and media coverage during the year.

$3,000 – $9,999
Alberts\n Sons/\nvoes
Lockheed Martin Santa Barbara Focalplane
Pacific Coast Business Times

$1,000 – $2,999
Halper Fine Art
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Direct Relief International
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Fess Parker Wine Country Inn & Spa
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Gelson’s Market
Granada Theater
Impact Hub Santa Barbara
Island Packers
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Mr. Buck Lindolof
Lobens Theatre Foundation
Melville Winery
Metropolitan Theatres
Michay Salon & Spa
Ms. Nancy Murdock
Santa Barbara Botanic Gardens
Santa Barbara Chamber Orchestra
Santa Barbara City College
Spotlight

American Indian Health & Services
Since 2009, American Indian Health & Services has partnered with United Way to provide much needed health and vision screenings for Fun in the Sun participants. As a result, hundreds of scholars and their families have received health screenings and referrals that helped them get needed care.

Community Partner

Thank You!

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In addition to the community partners listed here, more than 60 other organizations played vital roles as community partners in United Way of Santa Barbara County’s Fun in the Sun Program (see page 9) and the 23rd Annual Day of Caring (see page 17).
Charting the Course for a Bright Future

First and foremost, I want to thank Paul Didier for his hard work and commitment to building United Way of Santa Barbara County into what it is today. Over the last 42 years, his leadership has been characterized by unwavering dedication, strategic thinking, and—most importantly—the innovative ideas behind many of UWSBC’s award-winning partnerships and services. The resulting recognition is an asset that we will continue to benefit from for many years to come.

As incoming President & CEO, I am excited to work with such a great team of board members, staff, and supporters. They are truly dedicated to improving the lives of everyone in our community. In the coming years, United Way of Santa Barbara County will continue to create, direct, and support innovative strategic partnerships across multiple sectors to improve education, health, and financial empowerment throughout the county.

On a personal note, I want to thank Paul for his mentorship and support over the past 11 years. I know that I am fortunate to have worked so closely with a visionary leader who was willing to share his insights. As we move forward together, I am confident that with the help of our outstanding board, staff, and volunteers, we will build on United Way of Santa Barbara County’s 93-year history of success, and create a brighter future for everyone in Santa Barbara County.

Steve Ortiz, MBA
Incoming President and CEO
United Way of Santa Barbara County
United Way’s Programs and Initiatives are making life better for everyone in Santa Barbara County.